

# REQUEST FOR PROPOSAL

Central Coast Commission for Senior Citizens, Area Agency on Aging is soliciting proposals for the provision of services under the Older Californians Act in the San Luis Obispo and Santa Barbara Counties, for the period October 1, 2023 through March 30, 2026.

**AWARDING AGENCY:** Central Coast Commission for Senior Citizens, Area Agency on Aging  
528 South Broadway, Santa Maria, CA 93454

**CONTACT PERSON:** Aaron Pankratz, Contract Manager – 805.925.9554

**DATE OF ISSUANCE:** July 3, 2023

**DEADLINE FOR SUBMISSION:** August 18, 2023, 5:00 p.m., close of business at 528 S. Broadway, Santa Maria, CA 93454 or received by email to [aaron.pankratz@centralcoastseniors.org](mailto:aaron.pankratz@centralcoastseniors.org). Proposals will not be accepted at any other location. Proposals must be hand delivered or mailed. E-mail will be accepted (confirmation email is proof of receipt). Late submissions will not be considered.

**TIMETABLE:**

	<b>Due Date</b>	<b>Time</b>
Applicant's Conference	July 10, 2023	2:00 p.m.
Letter of Intent (Mandatory)	July 15, 2023	5:00 p.m.
Deadline for Question Submission	August 4 , 2023	
Application Submission	August 18, 2023	5:00 p.m
Evaluation of Proposals	August 21- 31, 2023	
Publication of PRC preliminary recommendations	Sept 1,2023	
Public Hearing on PRC draft recommendations	Sept 6, 2023	1:00 p.m.
PRC presents draft recommendations to Board of Directors	Sept 21, 2023	3:00 p.m.
Awards Announced	Sept 29, 2023	
Services Begin	October 1, 2023	

**APPLICANTS CONFERENCE:** A conference will be held on Monday, July 10, 2023 beginning at 2 p.m. at the Area Agency on Aging office located at 528 S. Broadway, Santa Maria, CA and via Zoom. The purpose is to briefly explain the proposal, review process, requirements, and other pertinent areas.

**LETTER OF INTENT:** Submission of a Letter of Intent is mandatory. It is the Applicant's responsibility to secure a receipt of its delivery to the Area Agency on Aging.

**FUNDS AVAILABLE:** The availability of the funds identified below is contingent upon receipt of adequate state and federal funds from the California Department of Aging.

**BACKGROUND:** The OCA's first major amendment in 1996 (AB 2800) established various Older Americans Act (OAA) programs and introduced additional Community Based Service Programs (CBSP) not found in the OAA. Initially, these additional programs were funded primarily by the State's General Fund; budget cuts during the Great Recession, however, left these programs authorized but

unfunded. With the increasing population of Californians over the age of 60, reinvestment into the Older Californians Act Programs is essential.

### **Allowable Activities**

Activities funded under this investment should support the goal of modernizing the OCA to reflect changes in the needs of the 60+ population as well as the goals of the Master Plan for Aging. The AAAs may expand the scope of some of the existing OCA programs and fund innovative community-based service programs that address the evolving needs of older adults, people with disabilities, and seniors, provided the OCA Modernization contract permits such flexibility.

The Community Based Service Programs under the OCA Modernization contract (supportive services only) agreement OM-2223 includes the following:

- **Aging in Place (inclusive of OAA Title IIIB Supportive Services)-** Providing supportive services to individuals who are sixty (60) years of age and older or 18 years of age or older with a disability as defined by the Americans with Disabilities Act (ADA); and requires information, assistance, and supportive services to help the above-referenced individuals to remain in their homes and communities, rather than relocating or moving into an institutional setting. “Supportive services” provided include but are not limited to information, case management, education, referral services, legal assistance, assessment, home modifications, safety equipment, and other supportive services to enable older adults who reside in a community setting to continue aging in place within the home.
- **Alzheimer’s Day Care Resource Centers-** Specialized day care resource centers for individuals with Alzheimer’s disease and other dementia related disorders, as well as support for their families and seniors. Caregivers are provided respite opportunities while the client engages in activities provided by the day care resource center. California Welfare and Institutions Code, Division 8.5, Chapter 7.5 (the Mello-Granlund Older Californians Act [AB 2800, Statutes of 1996])
- **Caregiver Support for people with Dementia/ Alzheimer’s-** A two-year expansion pilot with an emerging or designated Aging and Disability Resource Center (ADRC). The program will provide screening, family support, purchase of supplemental services, and case management to serve family seniors.
- **Foster Grand Parent Program-** Provides meaningful volunteer community service opportunities to low-income older adults aged 60 and over through mentoring children with exceptional physical, developmental, or behavioral needs. California Welfare and Institutions Code, Division 8.5, Chapter 7.5 (the Mello-Granlund Older Californians Act [AB 2800, Statutes of 1996])
- **Linkages-** Provides care or case management to frail older adults age 60+ or functionally impaired adults age 18 and over to prevent or delay placement in institutional settings. California Welfare and Institutions Code, Division 8.5, Chapter 7.5 (the Mello-Granlund Older Californians Act [AB 2800, Statutes of 1996])
- **Caregiver Respite Care Services-** Provides temporary or periodic services to someone 60 and older or to an individual of any age with early onset Alzheimer’s disease or a related disorder with neurological and organic brain dysfunction, to relieve persons who are providing primary care who are not eligible for other public benefit programs. Respite services may also include recruiting and screening of caregiver providers and matching respite providers to clients. California Welfare and Institutions Code, Division 8.5, Chapter 7.5 (the Mello-Granlund Older Californians Act [AB 2800, Statutes of 1996])

- **Senior Companion Program (SCP)-** Provides personally meaningful volunteer community service opportunities to low-income older individuals for the benefit of adults who need assistance in their activities of daily living. California Welfare and Institutions Code, Division 8.5, Chapter 7.5 (the Mello-Granlund Older Californians Act [AB 2800, Statutes of 1996])
- **Senior Volunteer Development and Coordination-** Provides opportunities to develop, coordinate, and implement programs that enable older adults to engage in volunteerism opportunities. Senior Volunteer participants may include individuals who are age 60+ and/or individuals volunteering for programs that serve people age 60 and above.

**Funding Available: \$557,806 for 7/1/2023-3/30/2025 and \$380,700 for 4/1/2025-3/30/2026** (contingent upon receipt of adequate state and federal funds).

### **About the Area Agency on Aging (AAA)**

The Central Coast Commission for Senior Citizens is the designated Area Agency on Aging for San Luis Obispo and Santa Barbara Counties. The Older Americans Act provides a framework for a partnership among the different levels of government and the public and private sectors with a common objective to improve the quality of life for all older Americans by helping them to remain independent. The Area Agency on Aging provides the administrative framework for the provision of social, nutrition and health promotion services to older persons and their seniors in San Luis Obispo and Santa Barbara Counties through the Older Americans Act and the Older Californians Act. In conformance with its Area Plan, the Area Agency on Aging provides Subawards to agencies in the two-county area for the provision of services.

**DEFINITIONS:** A Responsive and Responsible Bidder is one who meets both the specifications of the RFP (a bid that varies materially from the specifications will be rejected) and has the resources and capacity to deliver the service within the specified time frame at the price contained in the bid (Title 22 section 7358 (b) (1) (2)).

Allocations are dependent upon the authorization and appropriation of funding. The goal of these funds is to provide support for those seniors who are caring for elders who are at risk of losing their ability to remain independent in their own homes and communities.

### **Term of Subaward**

July 1, 2023 to March 30, 2026.

### **Preparing for this Request For Proposal**

When preparing a proposal in response to this request, please:

- Carefully read the entire RFP document before you start;
- Submit appropriate questions, as instructed, if clarifications are needed. Questions must be submitted in writing and received by the AAA by the required deadline.
- Submit the Letter of Intent by the required deadline;
- Submit a complete Application by the required deadline;
- Make sure that all procedures and requirements of the RFP are accurately followed and addressed; and
- Contact the Central Coast Commission for Senior Citizens, Area Agency on Aging for access to manuals, resource materials pertinent to this RFP, or for any other issues relevant to the RFP.

## **Area Agency on Aging Governing Rules**

The AAA policy manuals and memoranda, AAA reporting requirements and procedures, and AAA program and fiscal assessment/evaluation criteria and instruments, are available on the AAA website. These govern the implementation of the Older Americans Act.

### **Applicant Eligibility**

Any public or nonprofit organization is eligible to submit an application under the following conditions:

- The applicant organization, if incorporated, must be in good standing and qualified to conduct business in California.
- The applicant organization must furnish proof of non-profit status, if applicable.
- The applicant organization must be willing to provide services that can serve the targeted population.
- The organization is technically and administratively capable of executing the services.

The California Department of Aging Subaward with the Area Agency on Aging states that the AAA ‘shall ensure that any subrecipients providing services under this Agreement shall be of sound financial status.’ Due to this requirement, all applications must provide financial data (Audit Report dated within the past 12 months) validating the Agency has a sound financial status. The Area Agency on Aging will measure the ‘working capital’, ‘current ratio’, ‘debt/equity’ and other ratios – and will review the Auditor’s notes for any ‘on-going concern’ or other issues that would impact financial status. Applications from agencies that do not have the required sound financial status will be rejected and returned as a ‘not responsible’ bid.

REQUIREMENTS: Services authorized by the Area Plan are required to be in compliance with all pertinent state, federal and local regulations, standards and legislation. A copy of the current year Subaward Agreement and the Standard Agreement from California Department of Aging will be available on the AAA website. Go to the CCCSC web page (<https://centralcoastseniors.org/volunteer-access-page/contractors> ). Password is ‘aaa’. Click on folder titled ‘RFP July 2023’.

A listing of applicable laws and regulations with which the subrecipient must conform will be on the AAA website, including a listing of Program Memoranda of the California Department of Aging, authorizing statutes and federal and State regulations, Title @ CFR Part 200 and 45 CFR Part 75, AAA policy manuals and memoranda, AAA reporting requirements and procedures, AAA program and fiscal assessment /evaluation criteria and instruments, and AAA appeal procedures.

It is possible that the CA Department of Aging will issue modifications of the Standard Agreement that may affect any or all applicants. Changes or revisions of applicable laws and regulations may be issued during the subaward period. Subrecipients are responsible to ensure that the provision of services is in compliance. Lack of knowledge regarding the rules does not exonerate the subrecipient.

### **Payment Terms and Restrictions/Method of Payment**

1. Payments. Upon receipt of funds from the California Department of Aging payments will be made to the subrecipient in accordance with CDA Program Memos and the procedures of the Central Coast Commission for Senior Citizens, Area Agency on Aging.
2. Payment Procedures - Monthly Report of Expenditures and Request for Funds.

This is a two-page report. Page 1 is the Request for Funds. Page 2 is the Report of Expenditures and Revenues. Subrecipients are required to submit a report of expenditures and revenues to the AAA no later than the twentieth day of the month following the month being reported. A schedule of due dates for the Fiscal Year is an Exhibit in the AAA Service Provider Manual. One copy must be submitted to the AAA office in Santa Maria. Requests for Funds received at least five (5) days prior to the scheduled payment processing, will be accepted for processing. Requests for Funds received less than five (5) days prior to the scheduled payment processing, will be accepted for processing in the following scheduled payment process.

## Insurance Requirements

1. Coverage. Prior to commencement of any work under a Subaward agreement, the Subrecipient shall provide for the term of the Subaward agreement, the following insurance:
  - a. General liability of not less than \$1,000,000 per occurrence for bodily injury and property damaged combined. The AAA in cases of higher than usual risks may require higher limits.
  - b. Automobile liability including non-owned auto liability, of not less than \$1,000,000 for volunteers and paid employees providing services supported by the Subaward agreement.

If applicable, subrecipients shall comply with the Public Utilities Commission (PUC) General Order No. 115-F, which requires higher levels of insurance for chapter-party carriers of passengers and is based on seating capacity as follows:

\$1,500,000 if seating capacity is 8 - 15

\$5,000,000 if seating capacity is 16 or more

- c. Professional liability of not less than \$1,000,000. As it appropriately relates to the services rendered. Coverage may include medical malpractice and/ or errors and omissions.
2. Acceptable Insurer. The insurance will be obtained from an insurance company acceptable to the California Department of General Services, Office of Risk and Insurance Management, or be provided through partial or total self-insurance acceptable to the Department of General Services.
3. Evidence of Insurance. Evidence of insurance shall be in a form and content acceptable to the California Department of General Services, Office of Risk and Insurance Management. Insurance obtained through commercial carriers shall meet the following requirements:
  - a. The Certificate of Insurance shall provide that the insurer will not cancel the insurer's coverage without thirty (30) days prior written notice to the AAA, or ten (10) days written notice if the reason for cancellation is non-payment of insurance premium.
  - b. The Certificate of Insurance shall provide that the AAA, its officers, agents, and employees are included as additional insured's, but only insofar as the operations under the Subaward agreement are concerned. Professional liability coverage is exempt from this requirement.
  - c. The AAA shall be named as certificate holders and the addresses must be listed on the certificate.
4. Period of Coverage. The insurance provided herein shall be in effect at all times during the term of the Subaward agreement. In the event the insurance coverage expires during the term of the Subaward agreement, the Subrecipient will agree to provide the AAA at least thirty (30) days prior to the expiration date, a new certificate of insurance evidencing insurance coverage as provided herein for a period not less than the remaining term of the Subaward agreement or for a period not less than one (1) year. In the event the Subrecipient fails to keep in effect at all times said insurance coverage, the AAA may, in addition to any other remedies it may have, terminate the Subaward agreement.

5. Worker's Compensation. The Subrecipient must be insured against liability for Worker's Compensation or undertake self-insurance in accordance with the provisions of the Labor Code. The Applicant affirms to comply with such provisions before commencing any performance of the work of the agreement (Labor Code, Section 3700).

6. Certificate Submittal. A copy of each appropriate Certificate of Insurance referencing the Subaward agreement number, or letter of self-insurance, shall be submitted to the CCCSC as part of the subaward contingency process.

7. Indemnification. The Subrecipient must indemnify, defend and hold harmless the CCCSC, its officers, agents and employees from any and all claims and losses accruing or resulting to any contractors, suppliers, laborers and any other person, firm or corporation furnishing or supplying work services, materials, or supplies in connection with the performance of the Subaward agreement and from any and all claims and losses accruing or resulting to any person, firm, or corporation who may be insured or damaged by the Subrecipient in the performance of the Subaward agreement.

**PERFORMANCE BASED SUBAWARD AND PAYMENT SYSTEM:** The Area Agency on Aging utilizes a performance based Subaward and payment system with the services provided. The goal of the performance based Subaward and payment system is to develop more cost effective programs, encourage provision of Subaward level of service and expand the capacity to serve older persons. If the service level for the fiscal year falls below 95% of the subaward level, the actual percentage performed will be used to calculate the maximum percentage of the subaward value to be reimbursed.

**CLIENT ASSESSMENT:** Client assessment is required at the start of the contract year (July 1) on all clients to determine, and to properly document, client eligibility for services. Reassessment required January 1 (every six months) for all services.

**SECURITY AWARENESS TRAINING:** The California Department of Aging subaward with the AAA states that 'the AAA subrecipient agrees to provide ongoing education and training, at least annually, for all employees and subrecipients who handle personal, sensitive or confidential information. Subrecipients will complete the Privacy and Security Awareness Training module located on the Department's website, [www.aging.ca.us](http://www.aging.ca.us) within 30 days of the start date of the Agreement or within 30 days of the start date of any new employee or contractor. The Subrecipient must maintain certificates of completion on file and provide an electronic copy to the Area Agency on Aging upon request, within ten (10) days of completion.

**ENCRYPTION REQUIREMENTS:** Encryption is required on computer backup files. The Subrecipient is required to use 128Bit encryption for data collected under this Agreement that is confidential, sensitive, and/or personal including data stored on portable computing devices (including but not limited to, laptops, personal digital assistants, notebook computers, and backup media) and/or portable electronic storage media (including but not limited to, discs and thumb/flash drives, portable hard drives, and backup media). The Subrecipient shall ensure that all electronic information is protected by performing regular backup of automated files and databases, and ensure the availability of information assets for continued business. The Subrecipient shall ensure that any portable electronic media used for backups is encrypted.

**SAM NUMBER:** All Subrecipients are required to obtain a Unique Entity ID (UEI) and to maintain registered status in the Federal System for Awards Management (SAM).

1. UEI is the 12 character alphanumeric ID established and assigned by SAM to uniquely identify business entities. A non-Federal entity is required to have a UEI in order to apply for, receive, and report on a Federal Award.

2. The UEI number must be provided to the Area Agency prior to the execution of this Agreement.
3. The subrecipient must have complied with the federal requirement to keep the UEI and related updates on the website at <http://fedgov.dnb.com/webform>.
4. The subrecipient shall review all UEI information annually to ensure it is up to date.
5. If the Area Agency cannot access the Subrecipients's UEI information related to this federal award on the Federal Funding Accountability and Transparency Act Subaward Reporting System, the subrecipient must immediately update the information as required.

## AUDIT REQUIREMENTS

Non-profit organizations that expend \$750,000 or more in Federal financial assistance in a year must have an audit performed as required by the Title 2 CFR Part 200 and 45 CFR Part 75. The audit is required to be completed not later than nine (9) months after the end of the organization's fiscal year. A copy of the completed Audit Report must be submitted to the AAA not later than thirty (30) days after the completion of the audit.

The audit must be properly procured - use Title 2 CFR Part 200 and 45 CFR Part 75 procurement standards; and provide maximum opportunities to small and minority audit firms. It must be performed in accordance with Government Auditing Standards -should be performed by an independent audit firm; and be organization-wide. It must be all inclusive - include an audit of the financial statements; an assessment of internal controls, test of transactions; and a determination of compliance with laws and regulations of all major federal programs and selected non-major program transactions. It must be performed in accordance with and address all issues contained in any federal OMB Compliance Supplement that applies to the Subaward program.

Non-profit organizations must include in the Contract with their selected audit firm, requirements that the auditors will comply with all applicable audit requirements, and that access to the work papers of the audit firm must be provided upon request, to the AAA and/or the THUMBDRIVEA.

If the Non-profit organization is not required to obtain an audit in accordance with Title @ CFR Part 200 and 45 CFR Part 75, the AAA must determine whether the organization expended the funds provided under this subaward in accordance with applicable laws and regulations. The AAA Audit Monitoring procedures are available for review at the AAA office in Santa Maria.

Non-profit organizations which have federal awards expended of less than \$750,000 per year, and are thereby exempted under Title 2 CFR Part 200 and 45 CFR Part 75, may not charge to Federal Awards the cost of an audit, or any other agreed upon procedures the scope of which is less than that of an audit.

The Contract requires additional reports to be included in Title 2 CFR Part 200 and 45 CFR Part 75 Audit:

- (a) Schedules that reflect a comparison to and any difference from actual audit amounts to the Budgets and to the Close-Out Reports on each Subaward.
- (b) The Schedule of Expenditures of Federal Awards (SEFA) has been modified by requirements. The Contract requires all State awards to be displayed in the SEFA in the same format as the Federal awards.
- (c) A report which also presents a determination of the accuracy to the close-out reports, program Income, matching and non-matching contributions (cash and In-kind), and to their compliance with applicable regulations.

## EXPECTED MINIMUM PERFORMANCE OF SELECTED SUBRECIPIENT

At a minimum, the selected subrecipient must meet all requirements contained in the California Department of Aging's applicable regulations, Master Standard Agreement, and AAA subrecipient Agreement.

The Service Provider Manual outlines the procedures and requirements required of all subrecipients receiving Subawards through the AAA. It sets forth accounting, auditing and other financial management responsibilities; property management; and other general information necessary. The AAA requires its staff to review the program administration, services/ operations and fiscal management aspects of programs. Program and discal monitoring is conducted annually.

Subrecipients awarded Title IIIIE funding, will be required to utilize SAMS software that will enable them to collect and transfer data for the purpose of submitting monthly Management Information System data to the Area Agency on Aging.

## APPLICATION PROCESS

### General Instructions

This format allows for a complete description of the Applicant's proposal. Forms will be provided at the Applicants Conference, which must be used in accordance with the instructions. Applicants must not deviate from the format and forms provided. Proposals submitted in response to this RFP must be in accordance with the following preparation and formatting instructions.

### Submission

#### 1. Proposal Package

Applicants submitting proposals in response to this RFP are doing so freely and are responsible for any development costs. Proposals will be submitted with the understanding that all proposals will be available for public inspection after the award has been made.

#### 2. Signature

Proposal documents must be signed by the applicant or by an agent of the Applicant, if s/he is a corporation officer authorized to sign Subawards on its behalf, a partnership member, or if s/he is properly authorized by a power of attorney or equivalent document submitted with the proposal. An unsigned proposal will be rejected as not responsive. A board resolution, board minutes or minute order must accompany the authorized signature.

#### 3. Copies

For hard copy submissions-Two (2) master copies of the complete Application package with attachments with original signature(s) must be submitted. In addition, four (4) copies of the Cover Sheet, Program Summary, Scope of Work (Sections A-N), Budget, Budget Narrative and Cost Allocation Plan must be submitted. Also submit a Thumbdrive containing a copy of all documents submitted in the Application package. Documents on the thumbdrive may be in MS Word, MS Excel or PDF formats.

Electronic submissions should include the same documntents. Documents may be in MS Word, MS Excel or PDF formats.

#### 4. Submission Date

The closing date for the receipt of proposals under this announcement is August 18, 2023. The proposals must be received by August 18, 2023, 5 p.m. at the Area Agency on Aging office in Santa Maria or by electronic means (email, Dropbox or similar cloud delivery option) to [aaron.pankratz@hotmail.com](mailto:aaron.pankratz@hotmail.com). Electronic submission are deamed received when they have been downloaded to an organization computer. Proposals received after August 18, 2023, 5 p.m. will not be considered. Mail or hand-deliver proposals to: Area Agency on Aging, 528 South Broadway, Santa Maria, CA 93454. It is the Applicant's responsibility to secure receipt of delivery to the Area Agency on Aging.

### Proposal Format

#### 1. General Instructions



These instructions prescribe the proposal format and presentation of proposal information. The format allows for the Applicant's proposal to be completely described and ensures a fair and easily read comparison among proposals. Therefore, it is important to follow the guidelines. This format does not preclude applicant's from elaborating on particular subjects or from identifying and discussing unique features of the proposal.

The proposal should be as thorough as possible. Forms are provided and must be used as instructed. Pages should be 8.5" x 11" white bond paper, numbered consecutively; single-spaced, using 12-point font. The Applicant must re-state each question in the order presented and the response must immediately follow each question.

## 2. Proposal Outline

- I. Cover Sheet
- II. Project Summary
- III. Scope of Work
  - A. Agency Background and Program Information
  - B. Current Services
  - C. Proposed Services
  - D. Program description
  - E. Client Population
  - F. Staffing Capability and Pattern
  - G. Utilization of Volunteers
  - H. Coordination with Network of Aging Services
  - I. Outreach and Publicity
  - J. Transportation and Access
  - K. On Going Funding
  - L. Suggested Donation
  - M. Long Range Planning
  - N. Program Management Characteristics
- IV. Implementation Plan
- V. Assurances
- VI. Budget Summary, Budget Narrative and Cost Allocation Plan
- VII. Forms/Appendices

1. Cover Sheet:

<b>I. Cover Sheet</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
1.) Title of Project 2.) Program Services To Be Provided 3.) Type of Application 4.) Applicant Agency 4A.) Project Director 5.) Type of Agency 6.) Dates of Project Period 7.) Amount of monies requested 8.) Name, Title and Address of Official Authorized to Sign for Applicant Agency 9.) Payee 10.) Signature of person named in Item 8 11.) Advisory Council application recommendation meeting date	Evaluate Applicant completeness and accuracy.

2. Project Summary Instructions: The Project Summary is a brief descriptive overview of the applicant agency, its administrative capabilities, and a summarized version of the overall project proposal as described in detail in the scope of work. It also presents a recent four (4) year history of program services and client service data (if applicable). Use six (6) month data for 2018/19.

<b>II. Project Summary</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. The Project Summary will include: <ul style="list-style-type: none"> <li>Brief description of Applicant Agency.</li> <li>Administrative capabilities.</li> <li>Summary of overall project as described in scope of work.</li> <li>Recent four (4) year history of program services and client service data using six (6) month data for FY 22/23, if applicable.</li> </ul>	A. Applicant submits complete and accurate information.

3. Scope of Work instructions: This section is the opportunity to describe in detail the proposal to deliver Family Caregiver Support Program Services.

<b>III-A: Agency Background and Program Information</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe Agency Mission Statement.	A. Proposed program supports Agency mission statement.
B. Describe Goals of Agency.	B. Program will assist Agency achieve its goals.
C. Describe experience in community based services.	C. Applicant's experiences providing community based services indicate a level of understanding and knowledge to ensure a successful Family Caregiver Support Program.
D. Describe Agency history.	D. Agency's history fits the program requirements to successfully implement and administer the proposed program.
E. Describe Geographic area served by the agency.	E. Applicant adequately demonstrates area for the proposed services in the proposed geographical area. Service area is appropriate.
F. Include the current locations of headquarters and subsidiary offices.	F. Headquarters and subsidiary offices in the program area will ensure access to the targeted client population in an effective manner.
G. Describe size of Agency.	G. Evaluate if Agency is staffed to ensure an effective program and satisfactory completion of administrative duties.

<b>III-B: Current Services</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe the services and activities that your agency is currently providing.	A. A description of services provided by the agency is included and demonstrates a capability of delivering services to seniors.
B. What are unmet needs of your current seniors? Describe other activities to address unmet needs.	B. Evaluate how agency identifies the unmet needs of seniors and what steps have been taken to address those unmet needs. Describe other activities to address unmet needs.
C. How many people are on your waiting list(s) for each program?	C. Evaluate size of waiting list to determine probability of Applicant meeting levels of seniors to be served.
D. How is your waiting list handled?	D. Evaluate what Applicant has done and is doing to reduce size of waiting list. Review criteria for selection to add to and remove from waiting

<b>III-C: Proposed Services</b>
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<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe the program for which you are seeking funds.	A. A description of proposed service model is provided and the Applicant demonstrates a detailed understanding of the specific model chosen.
B. List program goals.	B. Goals are clear and appropriate to the program, and are achievable if objectives are successfully implemented.
C. List program objectives.	C. Objectives are specific, measurable and if achieved will result in a successful program.
D. Describe demographic data of service area detailing age specific data.	D. Age data indicates sufficient seniors in service area and supports eligibility and targeting in accordance with the Older Americans Act.
E. Describe census data of service area by ethnic minority status.	E. Data supports that the proposed service area will serve a culturally diverse consumer population.
F. Describe census data of service area by poverty level.	F. Data supports that service area will have sufficient consumer at or below the poverty level to ensure an effectively targeted program.
G. Describe methods of assuring inclusion of consumer from these groups in the program.	G. Applicant's processes and procedures for ensuring that all eligible consumer are served is satisfactory.

<b>III-D: Program Description</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe the components of the program.	A. The applicant's response must contain a thorough overview of the procedures and processes for each component and be inclusive of quantifying each component.
B. Describe outreach methods and procedures.	B. Proposed methods & procedures will ensure that seniors find the services they are in need of. Process and procedure are time specific and responsible party is identified.
C. Describe intake procedure(s).	C. Proposed procedures are specific, measurable and will ensure that seniors to be served meet priorities of Older Californians Act.

D. Describe client assessment method(s).	D. Client will be adequately assessed to determine their need for the program and if the program can assist them.
E. Describe referral methods.	E. Referral methods will ensure that clients are connected to needed services.
F. Describe reassessment of client and the method and frequency to complete the reassessment.	F. Client reassessment will determine if client continues to need services and, if not, is terminated from service and/or referred to another appropriate source for services. Frequency of reassessment is adequate.
G. Describe the activities of the program to increase services and access to ethnic minority seniors.	G. Applicant has a reasonable approach and has described the activities, time-lines and responsible people who will administer and monitor the activities to increase services and access to ethnic minority seniors.
H. Describe the activities of the program to increase services and access to low-income seniors.	H. Applicant has a reasonable approach and has described the activities, time-lines and responsible people who will administer and monitor the activities to increase services and access to low-income seniors.
I. Describe the activities of the program to increase services and access to low-income minority seniors.	I. Applicant has a reasonable approach and as has described the activities, time-lines and responsible people who will administer and monitor the activities to increase services and access to low-income ethnic minority seniors.
J. Describe the activities of the program to increase services and access to seniors residing in rural areas.	J. Applicant has a reasonable approach and has described the activities, time-lines and responsible people who will administer and monitor the activities to increase services and access to seniors residing in rural areas
K. Describe the method(s) to be used to ensure preference for providing services to seniors with greatest economic need.	K. Applicant presents a method or procedure for ensuring preference for providing services to seniors with greatest economic need and demonstrates an understanding of the Older Americans Act.
L. Describe the method(s) to be used to ensure preference for providing services to seniors with greatest social need.	L. Applicant presents a method or procedure for ensuring preference for providing services to seniors with greatest social need and demonstrates an understanding of the Older Americans Act.
M. Describe the methods to be used to target seniors who have a mental illness.	M. Applicant presents an acceptable method for targeting seniors who have a mental illness.
N. Describe the methods to be used to target seniors who have multiple health problems.	N. Applicant presents an acceptable method for targeting seniors who have multiple health problems.

III-E: Client Population	
Requirements	Evaluation Criteria
<p>A. Provide an estimate of the consumers to be served. Provide the projected client profile by percentage of the following:</p> <p><b>Ethnicity:</b> Identify as Hispanic/Latino or Not-Hispanic/Latino</p> <p><b>Race:</b> If Not Hispanic/Latino identify as:</p> <p>American Indian or Alaskan Native</p> <p>Asian – If Asian identify appropriate subgroup</p> <p>Native Hawaiian or Pacific Islander</p> <p>White</p> <p>White-Hispanic</p> <p>Black/African American</p> <p><b>Gender:</b> Male or female</p> <p><b>Age:</b> &lt;60, 60-74, 75-84 and 85+</p> <p><b>Marital Status:</b> Married, Single/Never Married, Separated, Divorced and Widowed</p> <p><b>Employment:</b> Full-time, Part-time and None</p> <p><b>Relationship:</b> Husband, Wife, Son, Daughter, Grandparent, Other Relative/Other Family, Non-Relative/Non-Family, and Child/Children (under 18)</p> <p><b>Multiple Caregiving:</b> Cares for more than 1 person</p> <p><b>Poverty:</b> At or Below Poverty Level</p> <p><b>Rural:</b> Lives in Rural Area</p> <p><b>Living Arrangement:</b> Lives Alone</p>	<p>A. Projected client profiles appear appropriate to meet the goals of the Older Americans Act and achievable in the proposed service area with projected resources.</p>
<p>B. Provide estimated numbers of consumers in greatest economic need to be served.</p>	<p>B. Estimate appears to achieve targeted population goals as outlined in Older Californians Act.</p>
<p>C. Provide estimated number of consumers in greatest social need to be served.</p>	<p>C. Estimate appears to achieve targeted population goals of Older Californians Act.</p>

D. Provide estimated numbers of low-income ethnic minority consumers to be served.	D. Estimate appears to achieve targeted population goals of Older Californians Act.
E. Provide estimated numbers of consumers residing in rural areas to be served.	E. Estimate appears to achieve targeted population goals of Older Californians Act.
F. Estimate the number of units of service consumers to be provided during the project period (Only service time is acceptable. Preparation and travel time cannot be reported).	F. Applicant proposes a number of units of service that are reasonable and cost effective.
G. Define Unit of service.	G. Definition of unit of service matches the prescribed definition in the RFP.
H. Present the unit of measurement for the units(s) of service (i.e. hours, sessions, one way trips, etc...).	H. Applicant matches the prescribed unit of service measurement.

<b>III-F: Staffing Capability and Pattern</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe proposed staffing structure. List the categories and number of staff, as well as, the number of hours per week proposed for each staff position.	A. Applicant's staffing structure includes the list of staff categories, number of staff, and hours per week for each staff position. The staff is sufficient to operate the program to achieve its goals and objectives.
B. Include a brief statement of the duties of each staff member.	B. Proposed staffing information includes duty statements for each staff member.
C. Describe staff expertise to effectively administer program including knowledge regarding the Older Californians Act and/or laws applicable to the program affecting seniors in economic and/or social need.	C. Applicant describes staffing expertise and demonstrates the capacity of staff to provide effective program administration and service delivery.
D. Describe In-Service Plan.	D. Applicant describes content and schedule for in-service relevant to program operations.
E. Describe Staff Training Plan.	E. Applicant describes content and schedule for staff training relevant to program operations.

F. Describe the methods used to secure staff? Is this a direct hire or through agency or combination.	F. Applicant describes the method to secure staff.
G. Describe the screening process used in hiring staff? Does it include Live Scan? If not a direct hire, detail the screening requirements in vendor Subaward.	G. Applicant describes a screening process that will ensure the safety of the client and care receiver.

<b>III-G: Utilization of Volunteers</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Detail the use of volunteers in the Program.	A. Volunteers will enhance program effectiveness and efficiency.
B. Describe Training Plan for Volunteers.	B. Training for volunteers presents schedule and topics that will ensure volunteers can meet their responsibilities and duties.
C. Describe experience using volunteers.	C. The use of volunteers is a crucial element in program effectiveness and can significantly enhance the ability to deliver services to seniors.
D. Describe method(s) to recruit volunteers.	D. Methods demonstrate effectiveness in recruiting volunteers.
E. Describe plan to supervise volunteers.	E. Supervision of volunteers is essential to effective and efficient performance of volunteer duties and responsibilities. Proposed plan will ensure adequate supervision.

<b>III-H: Coordination with Network of Aging Services</b>	
<b>Requirements</b>	<b>Evaluation</b>
A. Describe experience in cooperative relationships with community-based organizations.	A. The Applicant demonstrates experience in cooperative relationships with other community-based services.
D. Describe experience, if any, working with regulatory agencies at the state and federal levels.	B. Applicant demonstrates relationships with regulatory agencies at the state and federal levels.
C. Describe methods that will be employed to coordinate with other aging/senior network services, community-based services.	C. Applicant has described detailed methods of communication and coordination with other aging/senior network, and community-based services. Applicant explains how this will enhance services to seniors.



D. List existing resources within the service area that will enhance and demonstrate program capacity to serve seniors and the relationship with the proposed program. List, if any, existing interagency agreements.	D. Resources within the service area for the target population are presented. Adequate explanation of the relationship with resources that if implemented will enhance capacity of program to address need.
E. Describe relationship with Adult Protective Services (APS) and referral procedures.	E. Applicant describes relationship with APS and an acceptable procedure to ensure appropriate referrals.

<b>III-I: Outreach and Publicity</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe how the Agency intends to communicate with culturally diverse communities.	A. The Applicant demonstrates how it will communicate with culturally diverse communities. Proposal appears reasonable for program success in achieving targeting goals.
B. Describe how the Agency intends to communicate with underserved populations.	B. The Applicant demonstrates how it will communicate with underserved populations. Proposal appears reasonable for program success in achieving targeting goals.
C. Describe how the Agency intends to communicate with low-income populations.	C. The Applicant demonstrates how it will communicate with low-income populations. Proposal appears reasonable for program success in achieving targeting goals.
D. Describe plans for providing education and educational materials to the community.	D. The Applicant provides detailed plans for community educational activities, and development of educational materials.
E. Describe plans to increase public awareness of program services.	E. Applicant provides detailed plans of how it will increase public awareness and demonstrates how these plans will achieve maximum public awareness of the proposed services.

<b>III-J: Transportation and Access</b>	
<b>Requirements</b>	<b>Evaluation Criteria</b>
A. Describe the various kinds of transportation available for participants to and from the service site. Be specific if more than one (1) site.	A. Applicant demonstrates the ability to ensure various kinds of transportation for participants to access program service sites.
B. Describe how the site will ensure access to people with hearing, visual, physical and mental disabilities.	B. Applicant describes access plans and/or procedures at the program site(s) for people with disabilities inclusive of all disabilities mentioned in the requirements section.

C. Describe how Applicant will ensure services to seniors with limited English proficiency.	C Applicant describes a process or procedure demonstrating full access to services for seniors with limited English proficiency.
<b>III-K: On-Going Funding</b>	
Requirements	Evaluation Criteria
A. Describe potential sources of funding, short-term and long-term, for the program and a plan to secure these funds.	A. Implementation of a plan to secure additional funds appears realistic.
B. Describe fund raising plans.	B. Detailed fund raising plan is provided, appears feasible and if successful ensures financial solvency of program.
E. If less funding is received than requested, describe contingency plan.	C. Applicant provides a contingency plan that will maintain the highest level of client services.

<b>III-L: Suggested Donation</b>	
Requirements	Evaluation Criteria
A. Describe the method(s) by which the caregiver is provided an opportunity to donate money to the program.	A. Description of the contribution method is provided ensuring seniors are aware the service is free and contributions are voluntary and confidential.
B Describe how a suggested donation schedule will be developed. Provide a copy of written information provided to client.	B. A description of how the suggested donation schedule will be developed is provided and it reflects input from clients served by program and local community standards.

<b>III-M: Long Range Planning</b>	
Requirements	Evaluation Criteria
A. Describe the process by which the program will develop a 3-5 year Strategic Plan. Provide a copy of the current Agency Strategic Plan.	A. The Applicant demonstrates the capability to develop a Strategic Plan.

<b>III-N: Program Management Characteristics</b>	
Requirements	Evaluation Criteria
A. Detail the monitoring procedures of the agency regarding the project. Describe the role of the Board of	A. Applicant has an adequate internal quality assurance program.

Directors, Project Advisory Council and Staff.	
B. Describe the agency's capacity to deliver services and utilize the services of workers who are fluent in the language spoken by a predominate number of seniors who are of limited English-speaking ability.	B. Applicant provides evidence that language is not a barrier to delivery of services and describes how this will be accomplished.
C. Describe the Client Grievance Procedure and how the client is advised of the protocol.	C. Proposed Client Grievance Procedure will include protocol for advising clients, and is compliant with requirements. Client is advised in a manner that assures understanding of the process.
D. Describe the role of the Project Advisory Council (PAC) in the development of this application. Specify their recommendations.	D. Project Advisory Council reviewed the application and its input is presented. Review and response by Agency to PAC recommendations appear satisfactory.
E. How do you plan to implement Project Advisory Council (PAC) if one doesn't already exist?	E. Applicant presents PAC Implementation Plan with timeline to ensure PAC is implemented in a timely manner and in accordance with the Older Americans Act.
F. Describe the recent activities and accomplishments of the PAC.	F. Application indicates senior input into program operations.
G. Describe Disaster Preparedness Plan in regard to client services.	G. Disaster Preparedness Plan will ensure client services and/or alternative services in the event of a disaster.
H. Describe the Client Satisfaction survey process/ procedure or other means to evaluate client's satisfaction.	H. Client satisfaction survey provides clients with an opportunity to influence program operations.

4. Implementation Plan: If the Applicant is starting a Family Caregiver Support Program for the first time or will be assuming program performance previously administered by another agency, then a start up or implementation plan must be addressed. The implementation plan should consist of information about the initiation, planning, execution, risk assessment, and maintenance or control of the Family Caregiver Support Program services.

<b>IV: Implementation Plan</b>	
Requirements	Evaluation Criteria

A. Describe how the Applicant will develop an Implementation Plan.	A. The Applicant demonstrates the capacity to develop an Implementation Plan that appears satisfactory to ensure program success.
B. Present an overview of the Implementation Plan, including timeframes, specific activities and responsible parties.	B. Implementation Plan includes elements that are consistent with a comprehensive plan such as initiation, planning, execution, risk assessment, and maintenance/quality control.

5. Assurances: Establishing a level of capability and demonstrating confidence that the program services will be executed in accordance with the RFP.

a.) Project Contractors: The applicant agrees to screen and find acceptable only those Contractors known to be fiscally responsible, administratively sound, and operationally reliable. The applicant must obtain approval of the Area Agency on Aging prior to committing to any Contracts.

b.) Sufficient Cash Flow: Private nonprofit applicant organizations must assure that they have sufficient financial support to cover the program's expenses for a minimum of ninety (90) calendar days.

c.) Board Resolution: The applicant agency must assure that a resolution from the Board of Directors (or legal governing body) identifying the person authorized to sign and approve agreements is on file with the Area Agency on Aging.

d.) Records: The applicant agrees to maintain all program and fiscal records within the geographical service area, or to have all records available at the AAA Santa Maria office within 48 hours upon request by the Area Agency on Aging.

<b>V: Assurances</b>	
Requirements	Evaluation Criteria
A. Applicant to make assurances as listed above, i.e; a, b, c & d.	A. Applicant submits complete and accurate information. Proposed program appears to ensure success. Proposed program complies with rules and regulations.

6. Budget Summary, Budget Narrative and Cost Allocation Plan

<b>VI: Budget Summary, Budget Narrative and Cost Allocation Plan</b>	
Requirements	Evaluation Criteria
A. Applicant must submit Budget Summary.	A. Budget presents adequate resources to achieve program's goals and objectives. Proposed program is cost effective. Proposed program match meets minimum requirements.
B. Applicant must submit Budget Narrative.	B. Budget narrative clearly describes costs. Costs presented are allowable. Calculations are correct.
C. Applicant must submit Cost Allocation Plan.	C. Cost Allocation Plan is prepared correctly. Presents a reasonable approach.

The AAA budget summary format is to be used. Forms are available on the AAA website.

A Cost Allocation Plan is required for all allocated costs. PERSONNEL COSTS cannot be allocated. They must be direct program charges supported by time cards/timesheets.

The Budget Narrative explains allocations on the Budget Summary and gives the formula and rationale for each line item amount. Explain all items and cost categories in the same order shown on the Budget Summary.

7. Forms/Appendices: Forms Provided by AAA as part of the application must be used as provided without alteration.

1. Statement of the purpose of the Organization or a copy of the Corporation By-Laws
2. Organizational chart
3. Articles of Incorporation
4. List of staff and job descriptions of all major project personnel
5. A copy of the most recent audit report, not more than 12 months old at time of submission and certified by an independent certified public accountant
6. Governing body resolution authorizing Title III application
7. Latest IRS and State Franchise Tax Board reports
8. List of Board of Directors (or governing body) on form provided
9. Minutes of the Project Advisory Council meeting that reviewed the application, if applicable
10. A copy of the minutes of the most recent three meetings of the Board of Directors
11. Statement listing any pending litigation involving the organization or key personnel of the organization
12. A copy of the Grievance Policy/Statement.
13. List of Project Advisory Council members on form provided.
14. A copy of the forms used for internal evaluation.
15. A copy of the Client Satisfaction Survey form.
16. A copy of the latest corporate balance sheet.
17. Proof of Nonprofit Status of Organization (not applicable for governmental agencies)
18. Copy of form used to solicit client donations.
19. SAM registration verification
20. Status report (not older than 4 weeks from date of submission) from Secretary of State
21. Status report (not older than 4 weeks from date of submission) from State Attorney general

<b>VII: Forms/Appendices</b>	
Requirements	Evaluation Criteria
A. Submit all forms and appendices, i.e.;1-21 above.	A. Applicant submits complete and accurate information.

Review and selection process

#### Screening

The Area Agency on Aging will evaluate each application with the same process to select applicant(s) who best respond to the Area Agency on Aging's requirements and program needs.

The Area Agency on Aging reserves the right to award a Subaward with or without further discussion of the proposal submitted. Therefore proposals should be submitted initially on the most favorable terms, from both budget and programmatic standpoints, which the applicant can propose. The Area Agency on Aging also reserves the right to reject any and all proposals received by reason of the Request for Proposal. The Area Agency on Aging also reserves the right to negotiate modifications after the bid/ proposal has been selected and before the Agreement is executed.

The Program scope of work and budget of the successful applicants shall be appended to and incorporated in the subaward. The terms and conditions set forth in the subaward should be reviewed carefully by interested parties. Compliance with the subaward conditions is mandatory.

The Area Agency on Aging has a policy regarding the time period to satisfy subaward contingencies. The Central Coast Commission for Senior Citizens, Area Agency on Aging, shall require the satisfaction of Subaward contingencies within 45 days of the date of Subaward. If contingencies are not satisfied within this period; (1) the applicant can request a waiver, within 90 days, which includes a hearing before the Board at its regular meeting. The hearing will be limited to: (A) circumstances of request and (B) basis of exempting Subaward allocation reduction; the Subaward allocation shall be reduced on a pro rata basis, from the beginning of the Subaward period

When deemed advisable by the Area Agency on Aging, the Area Agency on Aging reserves the right to arrange on-site fiscal and program assessments by the staff of the Area Agency on Aging to determine the applicant's ability to meet the terms and conditions of the Request for Proposal, application and Subaward.

## SELECTION EVALUATION CRITERIA AND PROPOSAL EVALUATION

A Proposal Review Committee (PRC) will be designated by the Area Agency on Aging to be responsible for the review and evaluation of all applications and the development of recommendations to be presented to the Area Agency on Aging Board of Directors. The Proposal Review Committee consists of members from the Area Agency on Aging Advisory Council and the Board of Directors.

The Area Agency on Aging staff will review each application and present its analysis to the Proposal Review Committee. The Proposal Review process will include an invitation for an interview with each applicant agency. The interview is considered a vital part of the application process because it may impact the rating given to each application in this competitive process. The applicant agency is strongly encouraged to send representatives that are informed about both the program and the specifics in the application.

The Area Agency on Aging will evaluate the Applicant's compliance with performance criteria, documentation and procedures required by this RFP. The proposal must demonstrate that all requirements are satisfied. Any need for clarification of proposals will be identified and clarifications requested.

### Subaward and Protest Procedure

#### 1. Award Determination.

Each Applicant will be provided a copy of the notice of award or non-award.

#### 2. Appeals.

An appeal concerning the evaluation method, the selection process, or other aspect of the RFP must be received no later than five (5) days after receipt of notification of non-award. An appeal must state the reasons for the protest, citing the law, rule, regulation, or practice on which the appeal is based. Protests must be in writing and sent by certified or registered mail to Central Coast Commission for Senior Citizens, Area Agency on Aging, 528 South Broadway, Santa Maria, CA 93454.

## Disposition of Proposals

All materials submitted in response to this RFP will become the Property of the Area Agency on Aging. Materials may be returned only at the Area Agency on Aging's option and at the Applicant's expense. One copy of the proposal shall be retained in official files as required by retention schedules.

**The weighted criteria to be used by the Proposal Review Committee are outlined below:**

<b>I: Cover Sheet</b>	
The Applicant completes the cover sheet completely and accurately.	
Total	<b>5 Points</b>

<b>II: Project Summary</b>	
The Applicant completes a brief description of the agency, describes administrative capabilities, completes an overview or summation of the overall project as described in the scope of work, and presents a four (4) year history of program services and client data using 6 month 18/19 data.	
Total	<b>10 Points</b>

<b>III-A: Agency Background and Program Information</b>	
The applicant indicates proposed program performance, demonstrates program supports mission statement, and program goals appear to help agency achieve goals. Applicant describes Agency experiences providing community based services indicating a level of understanding and knowledge to ensure successful program. Agency history fits program requirements to successfully implement and administer proposed program and adequately demonstrates the area for proposed services in proposed geographical area. Service area is appropriate. Agency headquarters and subsidiary offices in program area will ensure access to targeted client population in an effective manner. Agency is staffed to ensure an effective program and satisfactory completion of administrative duties.	
Total	<b>15 Points</b>

<b>III-B: Current Services</b>	
The Applicant describes the services provided by the agency and demonstrates a capability of delivering services to seniors, evaluates how the Agency identifies the unmet needs of seniors indicating what steps have been taken to address those unmet needs. Applicant evaluates size of waiting list to determine probability of meeting levels of seniors to be served, evaluates what has been done and is being done to reduce size of waiting list, whether it will successfully target OCA requirements and what criteria is used for selection to add to waiting list or remove from list.	
Total	<b>20 Points</b>

<b>III-C: Proposed Services</b>	
The Applicant describes a proposed service model and demonstrates a detailed understanding of the specific model chosen. Goals are clear and appropriate to the program, and are achievable if objectives are successfully implemented. Objectives are specific, measurable and will result in a successful Supportive Program. Census age data indicates sufficient seniors in service area and supports eligibility and targeting in accordance with the OCA, data supports that proposed service area will serve culturally diverse caregiver population, and data supports that service area will have sufficient seniors at or below poverty level to ensure an effectively targeted program. Applicant's processes and procedures for ensuring all eligible clients are served is satisfactory.	
Total	<b>30 Points</b>
<b>III-D: Program Description</b>	
The Applicant's response must contain a thorough overview of the procedures and processes for each component and be inclusive of quantifying each component. Proposed methods & procedures will ensure that clients find the services they are in need of. Process and procedure is time specific and responsible party is identified. Client will be adequately assessed to determine their need for the program and if the program can assist them. Referral methods will ensure that clients are connected to needed services. Client reassessment will determine if client continues to need services and if not, is terminated from service and/or referred to another appropriate source for services. Evaluate if Applicant has a reasonable approach and has described the activities, time-lines and responsible people who will administer and monitor the activities to increase services and access to ethnic minority seniors, low-income seniors, low-income ethnic minority seniors, and seniors residing in rural areas. Applicant presents a method or procedure for ensuring preference for providing services to seniors with greatest economic and/or social need, seniors with low-income ethnic minority status, and seniors residing in rural areas. Applicant demonstrates an understanding of the Older Californians Act. Applicant presents an acceptable method for targeting seniors who have a mental illness and/or have multiple health problems.	
Total	<b>30 Points</b>
<b>III-E: Client Population</b>	
Projected client profiles appear appropriate to meet the goals of the Older Californians Act and achievable in the proposed service area with projected resources, estimates appear to achieve targeted population goals as outlined in Older Californians Act, applicant proposes a number of units of service that are reasonable and cost effective, the definition of unit of service matches the prescribed definition in the RFP, applicant matches the prescribed unit of service measurement, and proposal will enhance program capacity to meet caregiver needs.	
Total	<b>15 Points</b>
<b>III-F: Staffing Capability and Pattern</b>	
Applicant's staffing structure includes the list of staff categories, number of staff,	



and hours per week for each staff position. The staff is sufficient to operate the program to achieve its goals and objectives. Proposed staffing information includes duty statements for each staff member. Applicant describes staffing expertise and demonstrates the capacity of staff to provide effective program administration and service delivery. Applicant describes content and schedule for in-service and staff training relevant to program implementation. Applicant describes the methods to secure seniors. Applicant describes a screening process that will ensure the safety of the client and care receiver.	
Total	<b>20 Points</b>

<b>III-G: Utilization of Volunteers</b>	
Volunteers will enhance program effectiveness and efficiency. Training for volunteers presents schedule and topics that will ensure volunteers can meet their responsibilities and duties. The use of volunteers is a crucial element in program effectiveness and can significantly enhance the ability to deliver services to seniors. Applicant methods demonstrate effectiveness in recruiting volunteers. Supervision of volunteers is essential to effective and efficient performance of volunteer duties and responsibilities. Proposed plan will ensure adequate supervision.	
Total	<b>10 Points</b>

<b>III-H: Coordination with Network of Aging Services</b>	
Applicant describes the methods it will employ to coordinate with other aging/caregiver network services and community-based services and explains how this will enhance services to seniors. The Applicant has provided information on its experience and ability to work in cooperative relationships with community agencies. Resources within the service area for the target population are presented. Adequate explanation of the relationship with resources that if implemented will enhance capacity of program to address need. Applicant describes relationship with APS and an acceptable procedure to ensure appropriate referrals.	
Total	<b>10 Points</b>

<b>III-I: Outreach and Publicity</b>	
The Applicant demonstrates how it will communicate with culturally diverse communities. Proposal appears reasonable for program success in achieving targeting goals. Applicant demonstrates how it will communicate with underserved and low-income populations. The Applicant provides detailed plans for community educational activities and development of educational materials. Applicant provides detailed plans of how it will increase public awareness and demonstrates how these plans will achieve maximum public awareness of the proposed services.	
Total	<b>15 Points</b>

<b>III-J: Transportation and Access</b>	
The Applicant demonstrates the ability to ensure various kinds of transportation for participants to access program service sites, describes access plans and/or procedures at the program site(s) for people with disabilities inclusive of all disabilities mentioned in the requirements section, and describes a process or	

procedure demonstrating full access to services for seniors with limited English proficiency.	
Total	<b>10 Points</b>

<b>III-K: On-Going Funding</b>	
Implementation of a plan to secure additional funds appears realistic. Detailed fund raising plan is provided, appears feasible and if successful ensures financial solvency of program. Applicant provides a contingency plan that will maintain the highest level of client services.	
Total	<b>5 Points</b>

<b>III-L: Suggested Donation</b>	
Description of the contribution method is provided ensuring seniors are aware the service is free and contributions are voluntary and confidential. A description of how the suggested donation schedule will be developed is provided and reflects input from clients served by program and local community standards.	
Total	<b>5 Points</b>

<b>III-M: Long Range Planning</b>	
The Applicant demonstrates the capability to develop a Strategic Plan.	
Total	<b>5 Points</b>

<b>III-N: Program Management Characteristics</b>	
Applicant has an adequate internal quality assurance program and provides evidence that language is not a barrier to delivery of services describing how this will be accomplished. Applicant proposes a Client Grievance Procedure, inclusive of protocol for advising clients, that is compliant with requirements and client is advised in a manner that assures understanding of the process. Applicant demonstrates that the Project Advisory Council reviewed the application and its input is presented. Review and response by Agency to PAC recommendations appear satisfactory. Applicant presents PAC Implementation Plan with timeline to ensure PAC is implemented in a timely manner and in accordance with the Older Americans Act. Application indicates senior input into program operations. Disaster Preparedness Plan will ensure client services and/or alternative services in the event of a disaster. Client satisfaction survey provides clients with an opportunity to influence program operations.	
Total	<b>25 Points</b>

<b>IV: Implementation Plan</b>	
Applicant demonstrates capacity to develop an Implementation Plan that appears satisfactory to ensure program success. Implementation Plan includes elements that are consistent with a comprehensive plan such as initiation, planning, execution, risk assessment, and maintenance/quality control.	
Total	<b>15 Points</b>

<b>V: Assurances</b>	
Applicant establishes a level of capability and demonstrates confidence that the program services will be executed in accordance with the RFP. Provides assurances for Project Subsubrecipients, Sufficient Cash Flow, Board Resolution and Records. Proposed program appears to ensure success and complies with rules and regulations.	
Total	<b>15 Points</b>

<b>VI: Budget Summary, Budget Narrative and Cost Allocation Plan</b>	
Applicant submits Budget Summary, Budget Narrative and Cost Allocation Plan that are complete and accurate. Proposed budget presents adequate resources to achieve program's goals & objectives. Proposed Program is cost effective. Budget Narrative clearly describes costs. Costs presented are allowable. Calculations are correct. Cost Allocation Plan is prepared correctly and presents a reasonable approach.	
Total	<b>25 Points</b>

<b>VII: Forms/Appendices</b>	
The Applicant submits all twenty one (21) Forms/Appendices and they are complete and accurate.	
Total	<b>10 Points</b>

Contingency: The awarding of subawards is contingent upon the receipt of sufficient monies and a Notification of Subaward from the California Department of Aging by the Central Coast Commission for Senior Citizens, and upon the regulations of the Older Americans Act. The Area Agency on Aging may not award a subaward to any Agency that has not fulfilled the subaward conditions of prior year periods.